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(54) Title: SYSTEM AND METHOD FOR PROVIDING INFORMATION TECHNOLOGY IT EXPERT REFERRAL OVER A NETWORK

(57) Abstract: A system and method for assigning an IT expert to a request for assistance. The invention allows users to request assistance over the Internet to an IT expert server having a file of qualified IT experts. The trouble "ticket" is assigned and alias and is sent out to a number of IT experts having the correct qualifications who then have an opportunity to respond. The first to respond is assigned an alias and communicates with the requester via the IT expert server. Upon completion of the ticket, the IT expert so designates and the requester is asked to fill out a survey noting the satisfaction with the service provided. IT experts are assigned rankings and are paid and solicited for further work based upon the ranking.

**Title of Invention:** System and Method for Providing Information Technology IT  
Expert Referral Over a Network

#### 4 Relationship to Other Applications:

5           **This application is a utility application which claims the benefit and priority of**  
6           **Provisional Application No. 60/167,065 entitled “System and Method for Providing Expert**  
7           **Help Over a Network” filed 11/23/99.**

**8 Field of the Invention:**

9           This invention relates generally to network access to for IT expert referral. More  
10 particularly the present invention provides a system and method for obtaining assistance via  
11 network notification to information technology (IT) experts and subsequent IT expert-to-  
12 customer contact.

**13 Background of the Invention:**

As computers and software proliferate, the need for help desk assistance becomes more and more critical especially to those customers who are not technically sophisticated. The difficulty is that individual customers become frustrated when they must sit on a help line for many hours before they get human assistance or, equally frustrating, are shunted to a frequently asked question screen, which has the answers to many questions that are not helpful for the particular problem that the individual customer is experiencing.

20           The present invention seeks to solve these problems by qualifying and establishing a  
21   large number of IT experts in various hardware and software fields. For example, the present  
22   invention will solicit and store qualifications for IT experts in Microsoft Windows, Sun  
23   products, Apple products, and indeed, many other hardware and software products. These IT  
24   expert, most of whom will be independent contractors (although not necessarily so), will be  
25   directly accessible via the database of the present invention.

1           After registration with the system of the present invention and providing customer  
2   contact information such as telephone number and email, when a customer needs particular  
3   assistance with a particular product, the customer will access the website of the present  
4   invention and state the problem being experienced. Once a query for help is made, the  
5   system of the present invention sends a pager or other notification signal to an appropriate IT  
6   expert who can handle the problem being experienced by the customer. Indeed, a call may  
7   go out to multiple IT experts all of whom have the option to respond to the particular request.  
8   Contact information is also presented to the IT experts in this first communication.

9           Whichever IT expert responds first to the request, that IT expert will have the contact  
10   information to immediately contact the customer experiencing the problem. In this fashion,  
11   one of the key problem areas, that is time of responding to a problem, is minimized.

12          The customer can then respond either via email through the server of the present  
13   invention to the customer or via Internet telephone through the server of the present invention  
14   to the customer. In either case response goes through the server of the present invention in  
15   order to be able to track such statistics as response time, and whether the customer was  
16   satisfied or dissatisfied with the response of the particular IT expert.

17          Once the problem is solved, the customer who experienced the problem is given the  
18   option of responding to a questionnaire simply asking if the problem was solved, if the IT  
19   expert was responsive to the question, and several other key questions that will assist the  
20   system of the present invention in evaluating the performance of the IT expert.

21          Statistics will be kept on the performance of IT experts involved in the system. For  
22   those IT experts who continually rank highly, calls for assistance will continue to go to those  
23   IT experts on a priority basis. For those IT experts who are not as successful, they will fall  
24   lower in the priority list and will not receive as many calls for assistance from the system.

1           A key aspect of the present invention is that the system is adaptive. If an Expert who  
2           is lower on the priority list continues to get high grades from customers for accomplishing  
3           tasks, that Expert can climb in the rankings and achieve a priority ranking thereby receiving  
4           more request for assistance and hence, more revenue from responding to customers needs.  
5           Conversely, those IT experts who do not receive favorable rankings from customers will fall  
6           in the overall rankings of IT experts and will not receive as many phone calls for assistance  
7           an hence, will not receive as much revenue from the present invention.

8           All transactions, in the preferred embodiment occur via the Internet, although this not  
9           meant as a limitation, whether they be by email, or Internet telephone. It will be apparent to  
10          those skilled in the art that communication between customer and Expert can also occur via  
11          telephone as well. And all transactions will proceed through the server of the present  
12          invention so that activities of IT experts and statistics on types and frequencies of certain  
13          troubled calls can be monitored.

14          In summary what is created is a virtual help desk, having IT experts in many different  
15          areas of IT expertise immediately and competently responding to the queries for help from  
16          customers who are in need.

17  
18           **Brief Description of the Figures:**

19          Figure 1 illustrates the architecture of the present invention.

20          Figure 2 illustrates the overall assign up, assignment, and Expert response flow of the  
21          present invention.

22          Figure 3 illustrates the Expert enrollment and interaction with the system of the  
23          present invention.

24          Figure 4 illustrates login screen for the Expert Help Network.

1           Figure 5 illustrates a screen in which the customer selects whether he needs help or is  
2 an IT expert.

3           Figure 6 illustrates a screen consisting of a data entry sheet requesting a plurality of  
4 answers pertaining to customer identification.

5           Figure 7 illustrates the customer's customer ID and password for entering the Expert  
6 Help Network.

7           Figure 8 illustrates a screen which confirms the customer's Name, city, and email  
8 address that is currently valid in the system.

9           Figure 9 illustrates a plurality of questions pertaining to the customer's problem.

10          Figure 10 illustrates a plurality of items of information regarding the customer's  
11 ticket.

12          Figure 11 illustrates a plurality of statuses regarding the customer's ticket(s).

13          Figure 12 illustrates a plurality of criteria for IT experts to join the Expert Help  
14 Network.

15          Figure 13 illustrates a plurality of questions and answers pertaining to IT experts.

16          Figure 14 illustrates a synopsis of how the network functions and the role of IT  
17 experts.

18          Figure 15 illustrates a plurality of requests for items of information regarding contact  
19 information for the IT expert(s).

20          Figure 16 illustrates a plurality of pull down menus regarding the IT expert's skills.

21          Figure 17 illustrates a request for a plurality of items of information regarding  
22 experience as an IT expert.

23          Figure 18 illustrates a plurality of items of information regarding references for IT  
24 experts.

1           Figure 19 illustrates the conceptual flow for assigning an alias to customer problems  
2 and IT expert's assignments.

### 3           **Detailed Description of the Invention**

4           Referring to Figure 1, the overall architecture of the present invention is illustrated.  
5 A plurality of customers, indeed anyone connected to the internet 9 or a network  
6 contemplated as one to be used with the present invention, her illustrated simply as two  
7 customers, customers 10 and 12, who are connected to the internet, may experience some  
8 form of computer-related or other type of problem. Customers 10, 12 contact the Expert  
9 Reference Server (ER Server) 16 via a network, preferably the Internet 14 although this is not  
10 meant as a limitation. For example other networks in addition to the Internet can also be  
11 used. Customers 10, 12 pose the particular question or problem being encountered with their  
12 system to the ER Server 16 over the network 14.

13           Depending upon the type of problem cited, ER Server 16 reviews its database of IT  
14 experts 20 for the individual or individuals who are capable of responding to the questions  
15 from customers 10, 12. This database of IT experts not only has qualifications of the IT  
16 experts but also maintains a database of their availability if, for example, an Expert is on  
17 vacation for a period of time or is unavailable during a period of the day. Upon determining  
18 the appropriate individual(s) who can respond to the problem, ER Server 16 sends a message  
19 via any means known in the art such as wired or wireless as in the case of beepers and cell  
20 phones, in this case illustrated as over the public switch telephone network (PSTN) 18 to the  
21 beepers of IT experts 22, 24, 26 with a general reference to the type of problem being  
22 encountered. This notification via PSTN is for illustrative purposes only. It is anticipated  
23 that the IT experts can also be notified via the Internet and the various means, such as  
24 Internet paging and telephone for example, available via the Internet.

1 IT experts 22, 24, 26 are beeped and, preferably an alphanumeric display noting the  
2 problem being posed by customers 10, 12 is displayed. At that point any one of the IT  
3 experts 22, 24, 26 can respond to ER Server 16 that he will handle the problem being posed.

4 Contact from IT experts 22, 24, and 26 can occur via the public switch telephone  
5 network 18 or via the network 14 to the ER Server 16.

6 Thereafter, and assuming, for example expert 22 responded first to the query, ER  
7 Server 16 allows contact between expert 22 and, for example customer 12 in the following  
8 fashion:

9 Internet telephone service can be used whereby expert 22 is connected to customer 12  
10 through server 16. In this fashion, ER Server 16 can monitor the length of the call and broker  
11 the connection between expert 22 and customer 12. Alternatively, the telephone number of  
12 customer 12 can be provided to expert 22. Thereafter, expert 22 can contact customer 12 to  
13 solve the problem by voice communication. Finally, ER Server 16 can provide the email  
14 address of customer 12 to expert 22 thereby allowing email response to the problem being  
15 posed and also allowing back and forth communication over network 14.

16 After the completion of the service call, expert 22 provides notification to ER Server  
17 16 that the call has been successfully completed. Expert Server 16 logs the completion time  
18 and date of the trouble call that was requested by the customer. In this way, statistics on the  
19 general length of time to respond to and solve customer problems can be logged. Further,  
20 information on the individual expert can also be kept in the following fashion:

21 ER Server 16 not only brokers a trouble call between customers 10, 12 and IT experts  
22 22, 24, and 26, but also keeps track of how well the individual IT experts perform in their  
23 assigned tasks. For example, at the completion of each trouble call, and after the expert has  
24 provided notification to the ER Server that the call has been completed, the ER Server  
25 provides a questionnaire to the customers 10, 12 seeking input on customer satisfaction with



1 the service being offered. At that point, customers 10, 12 have the opportunity to respond to  
2 ER Server 16 regarding whether the IT experts 22, 24, or 26 solved the problem successfully  
3 and in a timely fashion.

4 ER Server 16 collects statistics on the performance of IT experts 22, 24, and 26,  
5 thereby monitoring the performance of these IT experts. If any of the IT experts continually  
6 score poorly in the estimation of customers 10, 12, the ranking of that particular expert will  
7 be established as lower than that of the IT experts who perform successfully on various  
8 assigned tasks. This has several ramifications. If a particular expert does not perform well,  
9 that expert is put low on the priority list for being contacted by ER Server 16. If the expert  
10 continues to perform poorly on the tasks that are assigned, eventually the expert will be  
11 eliminated from the roll of IT experts who can respond to service calls. Conversely, if an  
12 individual expert who initially performed poorly begins to perform better on service calls  
13 assigned to that IT expert, ER Server 16 will keep track of that improvement thereby raising  
14 the priority of that expert and list of IT experts who will be called to respond to service calls.  
15 In this fashion, expert database 20 is continually updated and quality control on the IT  
16 experts who are contacted and assigned customer tasks can therefore be maintained.

17 In this fashion, a series of problems are solved by the system and method of the  
18 present invention. First, individual customers 10, 12 no longer have to wait inordinate  
19 amounts of time for response to trouble calls on their computer systems.

20 Server 16 establishes the mutual arrangement between customers 10 and 12 before  
21 any service call is made to IT experts 22, 24, and 26. In this fashion, IT experts 22, 24, and  
22 26 do not have to be concerned about how to invoice and collect fees from customers 10, 12.

23 Customers 10, 12 benefit from having the best IT experts who can solve technical  
24 problems since the ER Server 16 continually updates and establishes quality control via its

1 expert database 20 over the IT experts who are called to respond to trouble calls in the first  
2 place.

3 On a periodic basis, ER Server 16 and the business entity that surrounds that server,  
4 remits to IT experts 22, 24, and 26 their fees for the service calls responded to on a monthly  
5 or quarterly basis as desired.

6 Referring now to **Figure 2** the overall assign up, assignment, and expert response  
7 flow of the present invention is illustrated. A customer accesses the system of the present  
8 invention 100 preferably over the Internet although this is not meant as a limitation. For  
9 example, a customer may also provide information via a telephone or other means of  
10 communication.

11 Confirmation of the sign-up is then sent to the member via electronic mail 102  
12 providing a log in ID and password. Thereafter, either immediately upon receipt of the e-  
13 mail or on a subsequent occasion when services are needed the member logs into the system  
14 104. At this point the member has a number of options.

15 If the member is signing on initially the member can create or change the membership  
16 profile 148. This profile provides information on the member's organization, the type of  
17 equipment, and any other information relating to software and operating systems being run  
18 on the equipment and the network as appropriate.

19 The member also has the option of changing the member's password 150. If the  
20 member has already provided a request for assistance referred to as a "ticket" a member can  
21 view the ticket history 152. If the ticket relates to a particular problem that the member has  
22 asked to be solved, the member can view the specific ticket 154 to insure that the problem  
23 has been stated appropriately. Additionally the member is asked to fill out a survey 156 that  
24 relates to how well the problem was solved, was the problem solved in a timely way, was the  
25 interaction with the Expert satisfactory and other factors that would give rise to quality

1 assurance with respect to managing the IT experts who are affiliated with the system of the  
2 present invention. After the survey is completed it is submitted by the member 158 and the  
3 ticket is closed by the system. Thereafter billing for the services is accomplished 159.

4       Once the member has an account number and a password, the member can call in at  
5 any time whenever there is a problem requiring a consultant. In this instance, a member logs  
6 onto the system 104 and creates a ticket 106 which describes the difficulty being encountered  
7 in as much detail as possible. Once the screen detailing the problem has been completed the  
8 ticket is submitted 108 by the member. Confirmation email is sent to the member. The  
9 server of the present invention then takes the ticket that is submitted and e-mails it 110 to the  
10 appropriate IT expert group for response. In this instance the group may be a group of  
11 network IT experts, a group of IT experts in a particular software application, and the like. It  
12 should also be noted that communication with the IT expert groups is made by regular e-mail  
13 and wireless devices to the extent that the database has the appropriate communication  
14 information. This system then continually inquires to determine if any IT expert has  
15 responded to the ticket and indicated that he or she would respond. This is referred to as  
16 "booking" the ticket 112. If after a definable number of minutes the ticket is still not booked  
17 114 the system sends e-mails to another group of IT experts who can appropriately respond  
18 to the question being posed.

19       If the ticket has been booked by an IT expert 112 the system determines how the  
20 ticket was booked 116. If the IT expert responded over the Internet the Internet procedures  
21 invoked 117 as will be more fully explained below.

22       If the IT expert responded via e-mail the IT experts e-mail response is received by the  
23 system 118 and the system assigns the ticket to the IT expert who responded 120.

24       Upon assigning the ticket to the IT expert 120 an e-mail or other notification is sent to  
25 the IT expert requesting that he initiate customer contact. In addition, e-mail is sent to other

1 IT experts in the group of IT experts to whom e-mail was sent informing them that the ticket  
2 was booked to another IT expert 124 although the identify of the IT expert to whom the ticket  
3 was booked is not necessarily disclosed.

4 As further noted below, communication and record keeping of the system involves  
5 assigning alias numbers to both the request for assistance and for the response by the IT  
6 expert in order to ensure that communication flows through the server of the present  
7 invention.

8 The IT expert then communicates with the member 128 and the member interacts with the IT  
9 expert 126 to solve the problem disclosed in the ticket.

10 When the ticket has been closed, that is, the problem has been solved by the IT  
11 expert, the IT expert so notifies the server of the present invention to close the ticket and  
12 enters information that describes how the problem was resolved 130. The server then sends  
13 an e-mail message to the member 132 noting that the IT expert has closed the ticket and has  
14 solved the problem. The e-mail also requests that the member fill out a survey to note the  
15 members satisfaction with the problem solution, the IT experts performance, and any other  
16 factor that affects the resolution of the ticket originally submitted by the member.

17 The survey is a critical aspect of the present invention and is done in an automated  
18 fashion to minimize the labor associated with the member's participation in the survey.  
19 Further, the survey serves as a basis for paying IT experts for work accomplished or not  
20 paying IT experts when the result has been unsatisfactory to the member.

21 After submission of the survey to the member, the system continually inquiries in its  
22 own records to determine if the survey report has been filled out 134. If the survey has not  
23 been filled out after two days, a second e-mail request for the completion of the survey is sent  
24 to the customer 136. The system then again keeps track internally to determine if the survey  
25 has been filled out 138. If the survey has not been filled out after, for example two days, a

1 final e-mail request is sent to the member **140** to fill the survey out. The system then again  
2 internally monitors whether the survey has been completed **142**. If the survey has not been  
3 completed the survey is automatically filled in with certain default values and the ticket  
4 status is changed to a "closed" status **144**. Thereafter billing of the member ensues **145**.

5 When the member is in the process of completing the survey the member logs in **146**  
6 and views the ticket history **152**.

7 The member can then complete the survey as noted earlier **156** and submit that survey  
8 to the system **158**. Thereafter billing ensues.

9 Referring now to **Figure 3** the IT expert enrollment and interaction with the system is  
10 illustrated. An IT expert initially logs onto the system of the present invention and signs up  
11 to become an IT expert **160** who can be called upon to satisfy various tickets. The system of  
12 the present invention then sends an e-mail to the IT expert **162** confirming his registration  
13 and informing him of the pending assessment of the IT expert qualifications, and that this  
14 will take place BEFORE the IT expert is assigned any tickets by the system. In this way the  
15 entity managing the server of the present invention ascertains the IT expert's qualifications  
16 and areas of IT expertise. If the IT expert is not qualified in any of the areas in which the  
17 system responds to members an e-mail is sent to the IT experts so notifying the IT expert. If  
18 the IT expert has the requisite qualifications a confirmation e-mail is sent to the IT expert **168**  
19 and the IT expert is then logged onto the system. The IT expert is assigned a password and  
20 customer identification number for which the IT expert can then log in **170**.

21 At any point the IT expert can change or alter the IT expert's profile **172** thereby  
22 allowing the IT expert to more particularly respond to and be provided with information on  
23 tickets.

1           When the IT expert logs in 170 the IT expert can check in and out of the system 174  
2   and change the IT expert's availability 176 so that the system knows when the IT expert will  
3   be available to receive requests for ticket response.

4           The IT expert can also note the IT experts own tickets 178 that have been responded  
5   to, assigned and are in progress. The IT expert can click on any ticket that is noted and view  
6   a specific ticket 180 and determine if the ticket has been closed 182. If the ticket is not  
7   closed, it continues to be listed on those open tickets assigned to the IT expert 178. If the  
8   ticket is closed as far as the IT expert is concerned, the IT expert assigns a "close pending" to  
9   the ticket as noted earlier in Figure 2 130.

10          Once the IT expert logs in 170 the IT expert can also go to a file of unassigned tickets  
11   184 and view any specific one ticket 186 and determine if the IT expert can respond to the  
12   ticket. If the IT expert can respond the IT expert will book the ticket as noted earlier in  
13   Figure 2 120.

14          Upon entering the website, Fig. 4, the customer is presented with a login screen  
15   which asks also whether the customer is an IT expert or needs help 200. If the customer is not  
16   a member of the service, he is presented with a screen, Fig 5, in which he must select  
17   whether he needs help or he is an IT expert 202.

18          If the customer selects the "I need help" option 202, the customer is presented with a  
19   screen, Fig. 6, which consists of a data entry sheet requesting a plurality of answers  
20   pertaining to customer identification 204. Upon completion of the data entry sheet, Fig. 6,  
21   the customer is presented with a screen, Fig. 7, which furnishes the customer with his  
22   customer ID and password 206.

23          In the Customer Home screen Fig. 8, which confirms the customer's Name, City, and  
24   email address 208 that is currently valid in the system. Upon selecting "View/Create Ticket"  
25   the customer is presented with a screen, Fig. 9, which asks whether this is a new ticket 210

1 and under what category this ticket is to be considered **212**. Examples of categories are MS  
2 Exchange, Windows NT, etc. Additionally, the customer is furnished with a text box in  
3 which he enters a description of his current problem **214**. The customer is also presented  
4 with a button which allow him to enter the ticket **216**.

5 Once the ticket is entered, the customer is presented with a screen, **Fig. 10**, which  
6 furnishes a plurality of items of information regarding the customer's ticket **218**. The  
7 customer is notified by the IT expert via email (although this is not meant as a limitation)  
8 when he has been assigned to the trouble call **220** by the server.

9 If the customer selects "Ticket History," **222** he is presented with a screen, **Fig. 11**,  
10 which furnishes a plurality of statuses regarding his ticket(s) **224**.

11 If the customer selects the "I am an IT expert" option **200**, the customer is presented  
12 with a screen, **Fig. 12**, which gives some of the criteria for IT experts to join the IT expert  
13 Help Network **226**. If the customer selects the "FAQ" (frequently asked questions) button  
14 **228**, he is presented with a screen, **Fig. 13**, which answers a number of question pertaining to  
15 IT experts and the IT expert Help Network.

16 If the customer selects the "How it works" button **230**, he is presented with a screen,  
17 **Fig. 14**, which gives a synopsis of how the IT expert Help Network functions and the  
18 function of IT experts in the network.

19 If the customer selects the "Sign up" button **232**, he is presented with a screen, **Fig.**  
20 **15**, which furnishes a plurality of requests for items of information regarding contact  
21 information for the IT expert **234**. Upon selecting the "Next" button **236**, the customer is  
22 presented with a screen, **Fig. 16**, with a plurality of pull down menus regarding his skills **238**.

23 If the customer selects the "Next" button **236**, he is presented with a screen, **Fig. 17**,  
24 which requests a plurality of items of information regarding his experience as an IT expert  
25 **240**. If the customer selects the "Next" button **236**, he is presented with a screen, **Fig. 18**,

1 which requests a plurality of items of information regarding references as well as a text box  
2 for entering data pertinent to the reference 242.

3 Referring to **Figure 19**, the present invention performs an “aliasing” function  
4 to both ensure that communication between the ultimate client and the IT expert occurs  
5 through the server of the present invention.

6 When a ticket is open 250, the server creates an alias 252 for the ticket that is open.  
7 This alias is assigned to not only the ticket, but is associated with the person or entity that is  
8 having the particular problem. In this fashion, the server can always determine who the point  
9 of contact is at the customer entity for billing and survey purposes.

10 The ticket number with the associated alias is then made available to IT experts to  
11 respond to. When an IT expert accepts the particular troubled ticket 254, the IT expert is  
12 assigned an alias 256 which is associated with the ticket alias created 252. This IT expert  
13 alias 256 varies from ticket to ticket so that a particular IT expert who accepts five different  
14 tickets may in fact have five different aliases associated with the different tickets. All  
15 communication with respect to the problem occurs via the server which then associates the  
16 various ticket and IT expert aliases and ensures that communication reaches the ultimate  
17 customer from the IT expert.

18 When the ticket is closed 258, the various aliases are cleared 260 and these aliases are  
19 subsequently made available for further tickets and aliases. Thus, the unique alias for the  
20 ticket and for the IT expert accepting the ticket occur only so long as the ticket is opened.  
21 Once the ticket is closed, the alias identifiers are made available again for re-use.

22 It will therefore be apparent to those skilled in the art that other variations of the  
23 present invention in contacting IT experts via wired and wireless networks and in contacting  
24 customers by the IT experts using both wired and wireless means can be achieved without  
25 departing from the scope of the invention as disclosed.



1 I claim:

2 1. A system for obtaining IT expert referral comprising:

3 A server further comprising a file of IT experts having qualifications;

4 A network connected to the server for allowing access to the file of IT experts;

5 At least one user computer connected to the network for submitting a request for  
6 assistance ticket from a user and for accessing the file of IT experts in the server;

7 The server further comprising assignment instructions for assigning the request for  
8 assistance ticket to at least one IT expert for response and for receiving a response  
9 from the at least one IT expert to the assignment; and

10 The server further comprising communication instructions for facilitating the  
11 communication between the IT expert and the user regarding the request for  
12 assistance ticket.

13 2. The system for obtaining IT expert referral of claim 1 wherein the server further  
14 comprises instructions for registering and qualifying IT experts to be resident on  
15 the file of IT experts.

16 3. The system for obtaining IT expert referral of claim 2 wherein the assignment  
17 instructions further comprise contact information for contacting a the plurality of  
18 IT experts based upon IT expert qualifications.

19 4. The system for obtaining IT expert referral of claim 1 wherein the server further  
20 comprises instructions for sending a satisfaction questionnaire to the user upon  
21 completion of the request for assistance ticket by the IT expert to whom the  
22 request for assistance ticket was assigned.

23 5. The system for obtaining IT expert referral of claim 4 wherein the server further  
24 comprises instructions for creating a quality ranking for the IT expert to whom the  
25 request for assistance ticket was assigned.

- 1       6.     The system for obtaining IT expert referral of claim 5 wherein the server further  
2             comprises instructions for paying to IT expert based upon the quality ranking  
3             from the user.
- 4       7.     The system for obtaining IT expert referral of claim 5 wherein the server further  
5             comprises instructions for rank ordering IT experts based upon quality ranking  
6             and assigning subsequent requests for assistance based upon quality rankings.
- 7       8.     The system for obtaining IT expert referral of claim 1 wherein the server further  
8             comprises instructions for assigning an alias to the request for assistance from a  
9             user and for assigning an alias to the IT expert who responds to the request for  
10            assistance.
- 11      9.     The system for obtaining IT expert referral of claim 8 wherein communication  
12             between the IT expert and the user occurs through the server and wherein the  
13             server comprises a file of assigned aliases for routing messages between the expert  
14             assigned to the request for assistance the user making the request for assistance.
- 15      10.    The system for obtaining IT expert referral of claim 2 wherein the instructions for  
16             registering and qualifying IT experts further comprises recording the availability  
17             of IT experts to respond to requests for assistance and the areas of IT expertise of  
18             the IT expert.
- 19      11.    The system for obtaining IT expert referral of claim 1 wherein the server further  
20             comprises instructions for allowing a user to view the a status of tickets for the  
21             user.
- 22
- 23      12.    A method for IT expert referral comprising:  
24             a user requesting assistance over a first network

- 1 a server receiving the request for assistance and creating a ticket associated with  
2 the request  
3 the server communicating the ticket to a plurality of qualified IT experts over a  
4 second network;  
5 at least on IT expert responding to the ticket  
6 the server facilitating communication between the IT expert and the user to solve  
7 the ticket.
- 8 13. The method for IT expert referral of claim 12 wherein the plurality of IT experts  
9 is created by registering IT experts and verifying their qualifications before  
10 communicating the ticket to any one IT expert.
- 11 14. The method for IT expert referral according to claim 12 wherein the first network  
12 is the Internet and the second network is the Internet.
- 13 15. The method for IT expert referral according to claim 12 wherein the first network  
14 is the Internet and the second network is a PSTN.
- 15 16. The method for IT expert referral according to claim 12 wherein the first network  
16 is the Internet and the second network is a wireless network.
- 17 17. The method for IT expert referral according to claim 12 wherein the facilitating of  
18 communication comprises the server assigning an alias to the user and an alias to  
19 the IT expert; and passing communication between the IT expert and the user  
20 through the server by associating the user alias and the IT expert alias.
- 21 18. The method for IT expert referral according to claim 12 further comprising the IT  
22 expert closing the ticket with the server upon completion of the ticket by the IT  
23 expert and the server submitting a satisfaction survey to the user upon the  
24 completion of the ticket by the IT expert.
- 25 19. The method for IT expert referral according to claim 18 further comprising paying

- 1           the IT experts based upon the satisfaction survey.
- 2       20.    The method for IT expert referral according to claim 18 further comprising
- 3           creating a ranking of the IT expert based upon the satisfaction survey.
- 4       21.    The method for IT expert referral according to claim 20 further comprising
- 5           assigning subsequent tickets to the IT expert based upon the IT expert ranking.
- 6       22.    The method for IT expert referral according to claim 17 further comprising the
- 7           server clearing the aliases upon completion of the ticket.

8

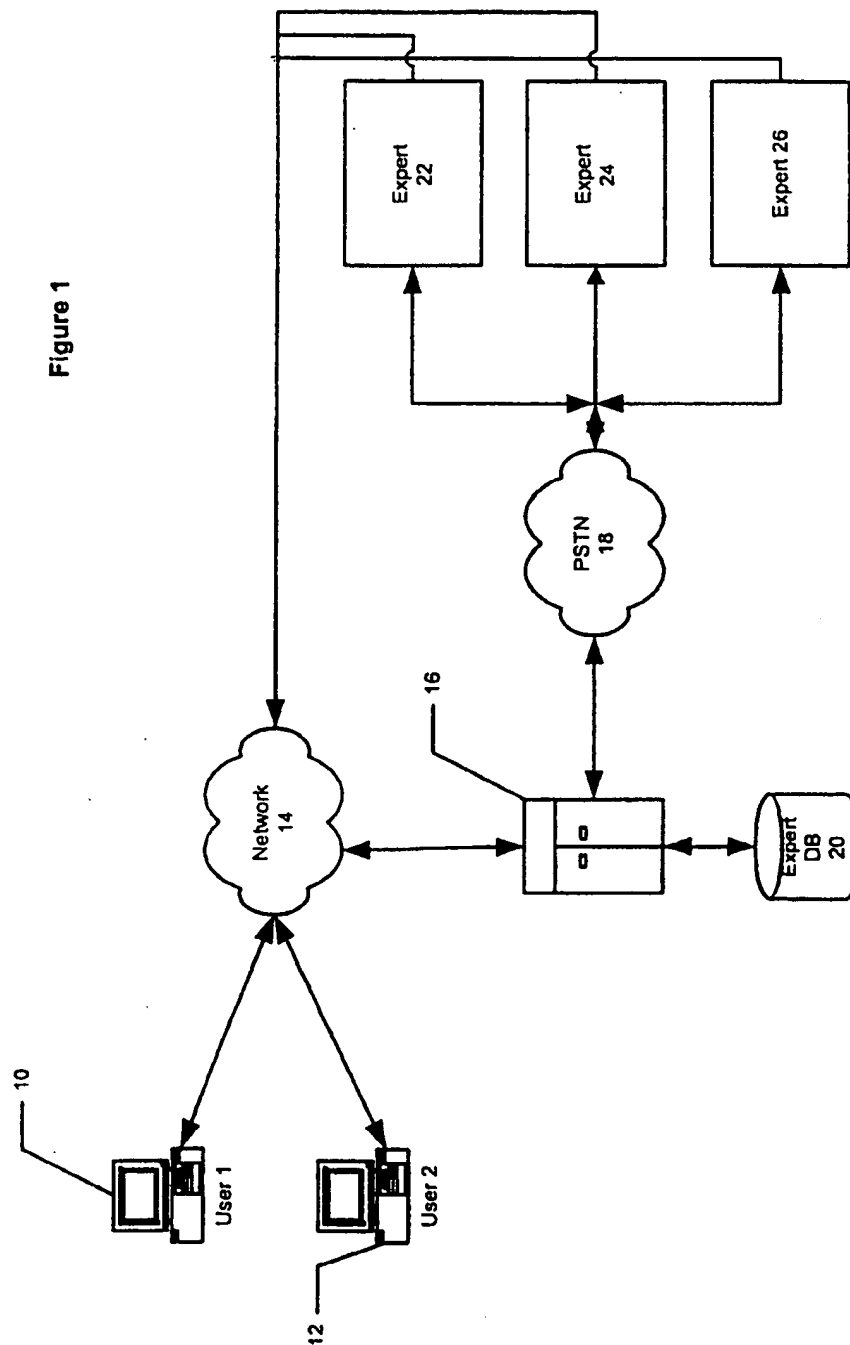
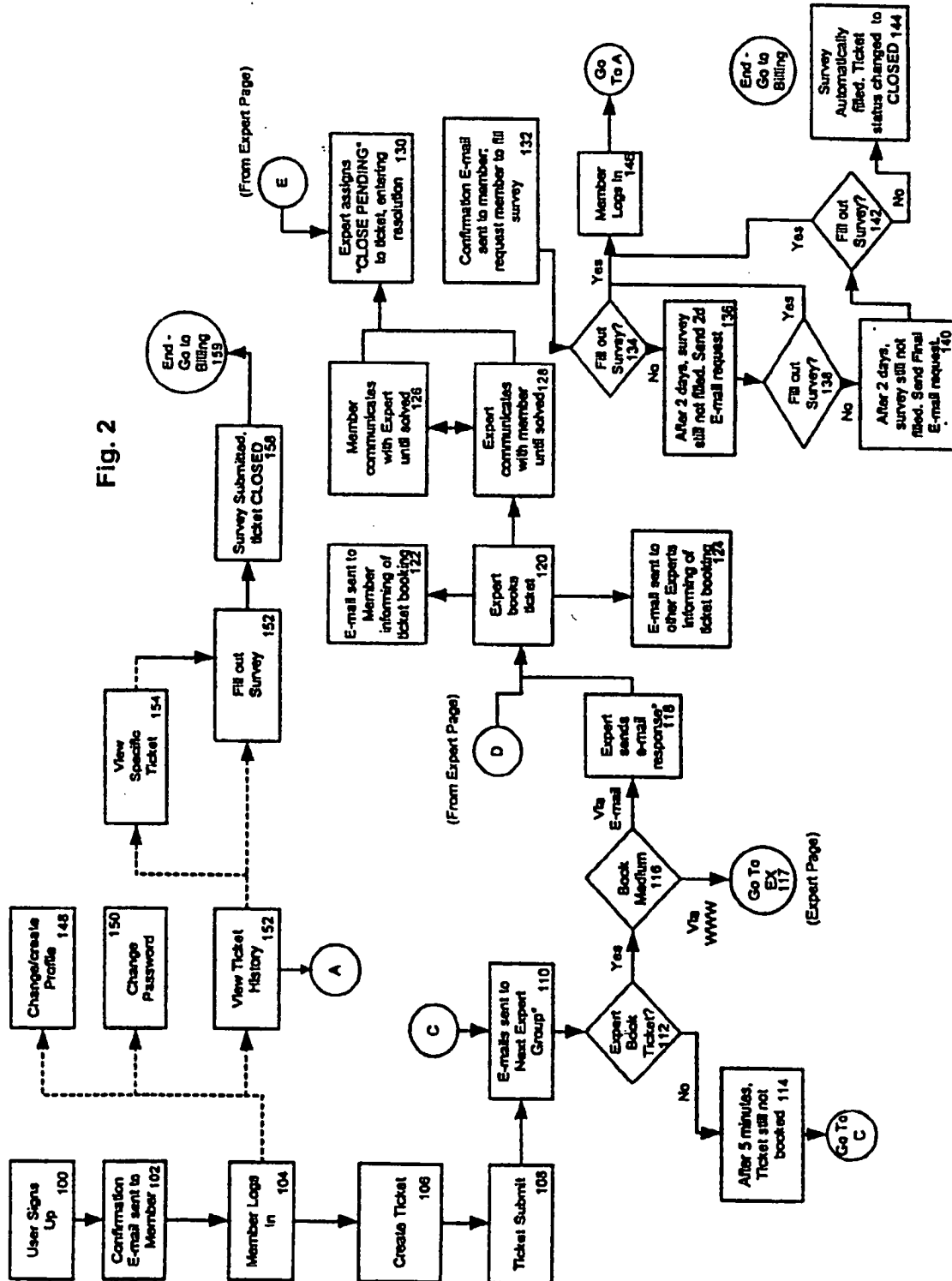


Fig. 2



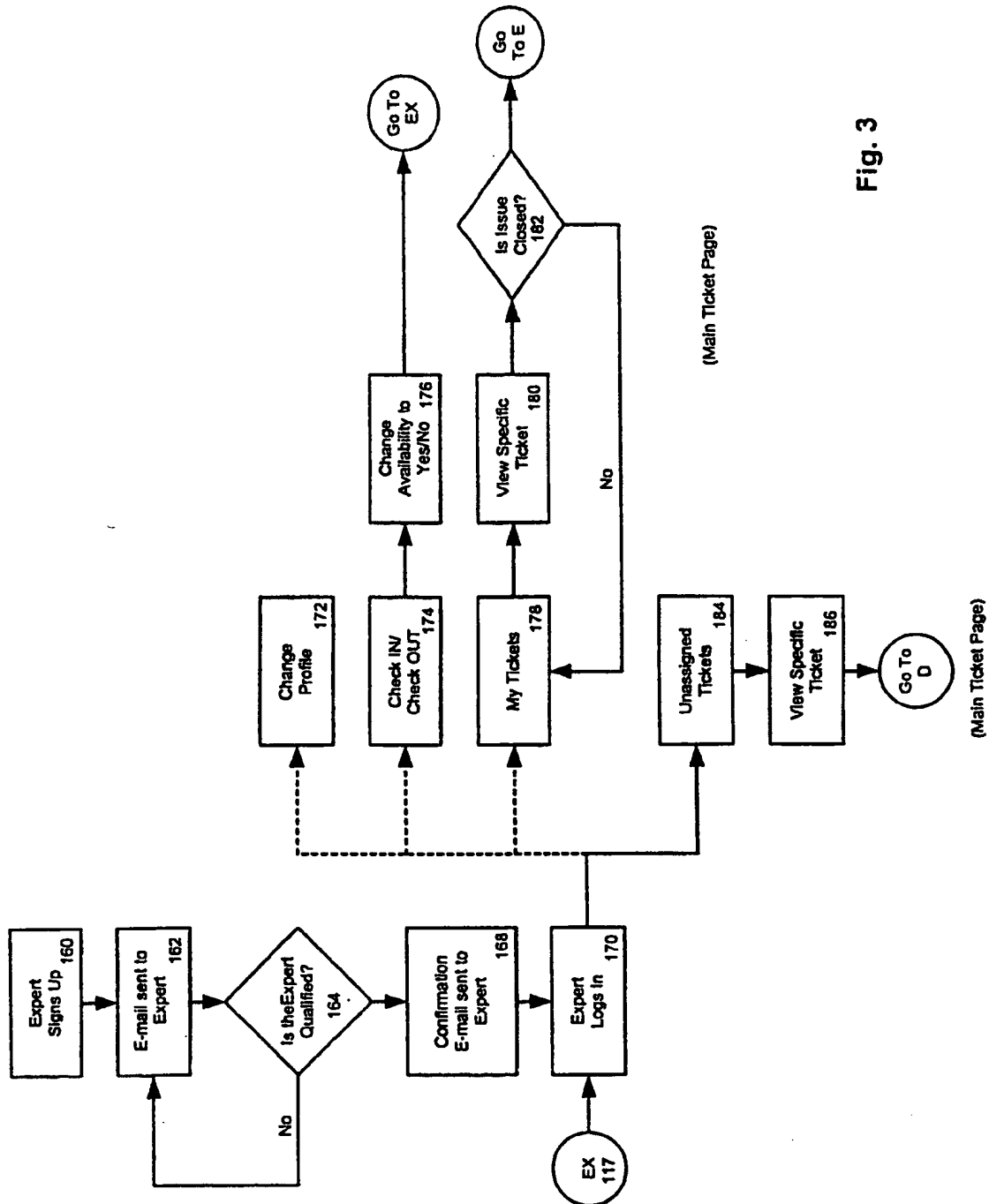


Fig. 3

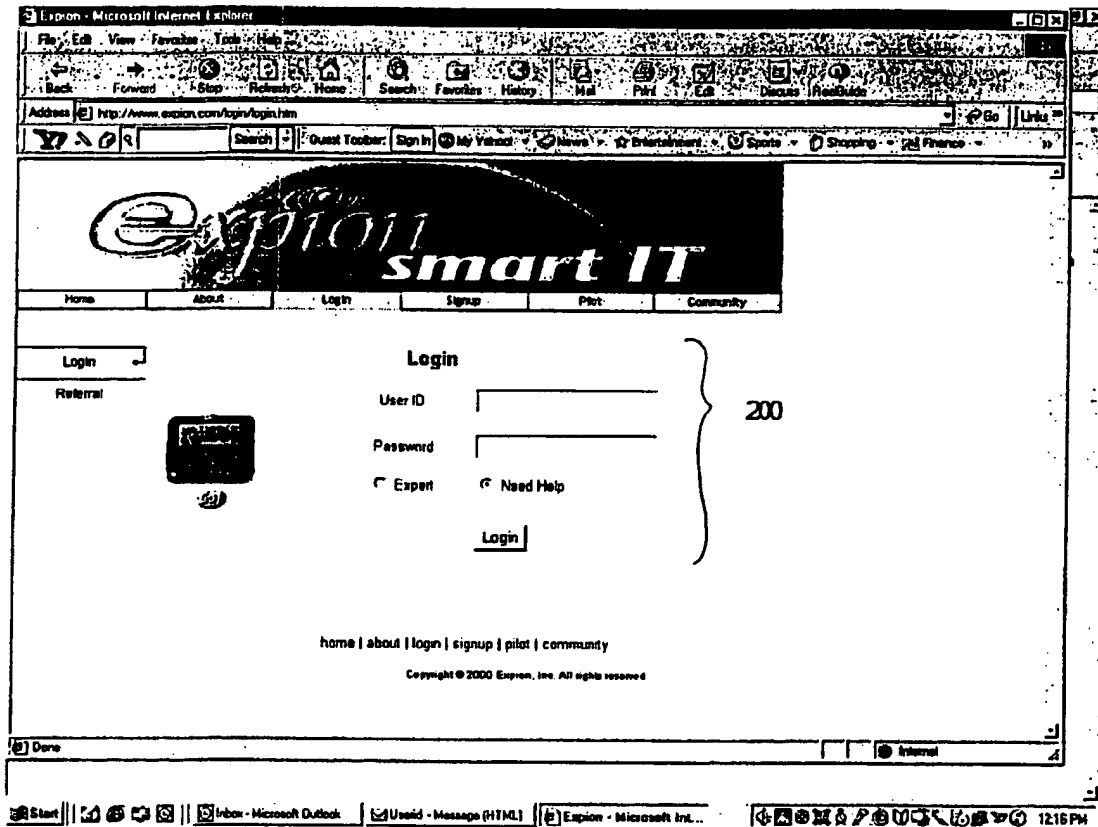


FIGURE 4



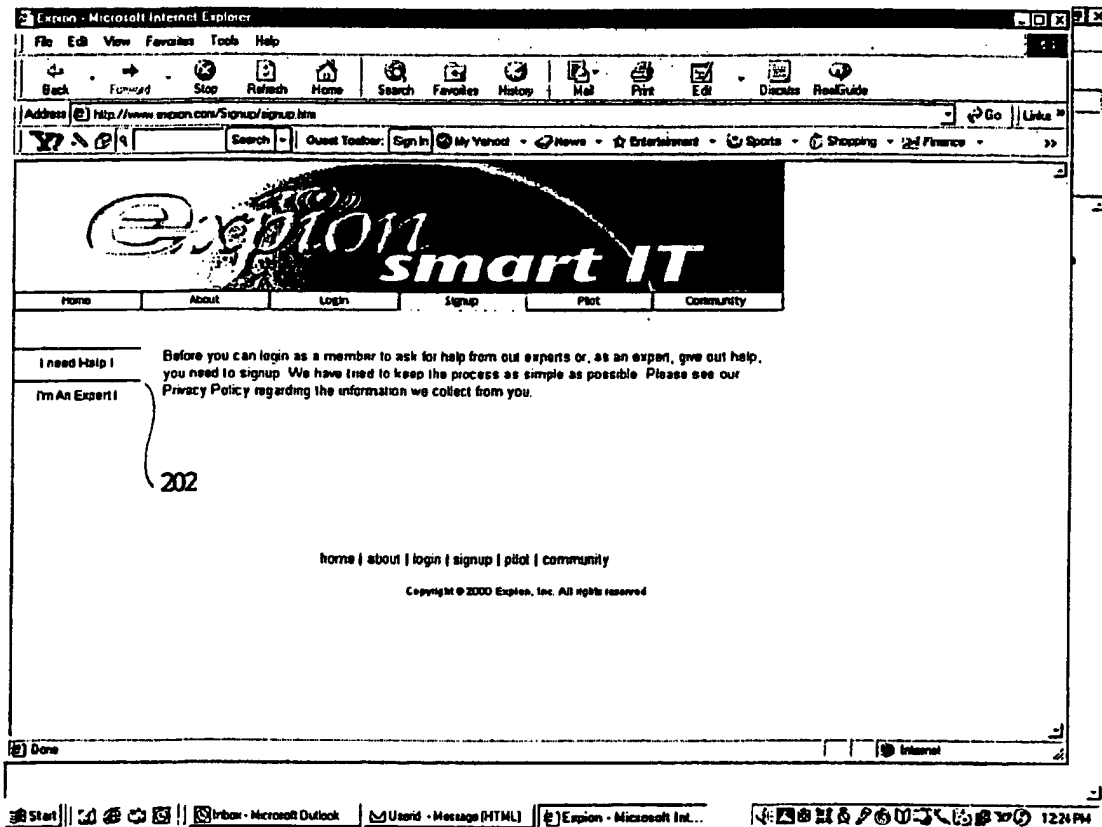


FIGURE 5

E-Helper.com - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites History Print

Address http://192.168.0.1/signup/member/member\_signup.htm Go Links

# E-Helper smart IT

Home About Login Signup Free Trial Community

I Need Help |

Who Can Join? |

FAQ |

How It Works |

Sign up

NOTE: An asterisk (\*) indicates a required field.

First name John

Last name Smith

Password

Confirm Password

Company

Email Jsmith@aol.com

Address1 123 Main ST

Address2

City AnyTown

State AnyCity

ZIP 12131

Country USA

How Did You Hear About Us

Submit Info Clear Form

204

FIGURE 6

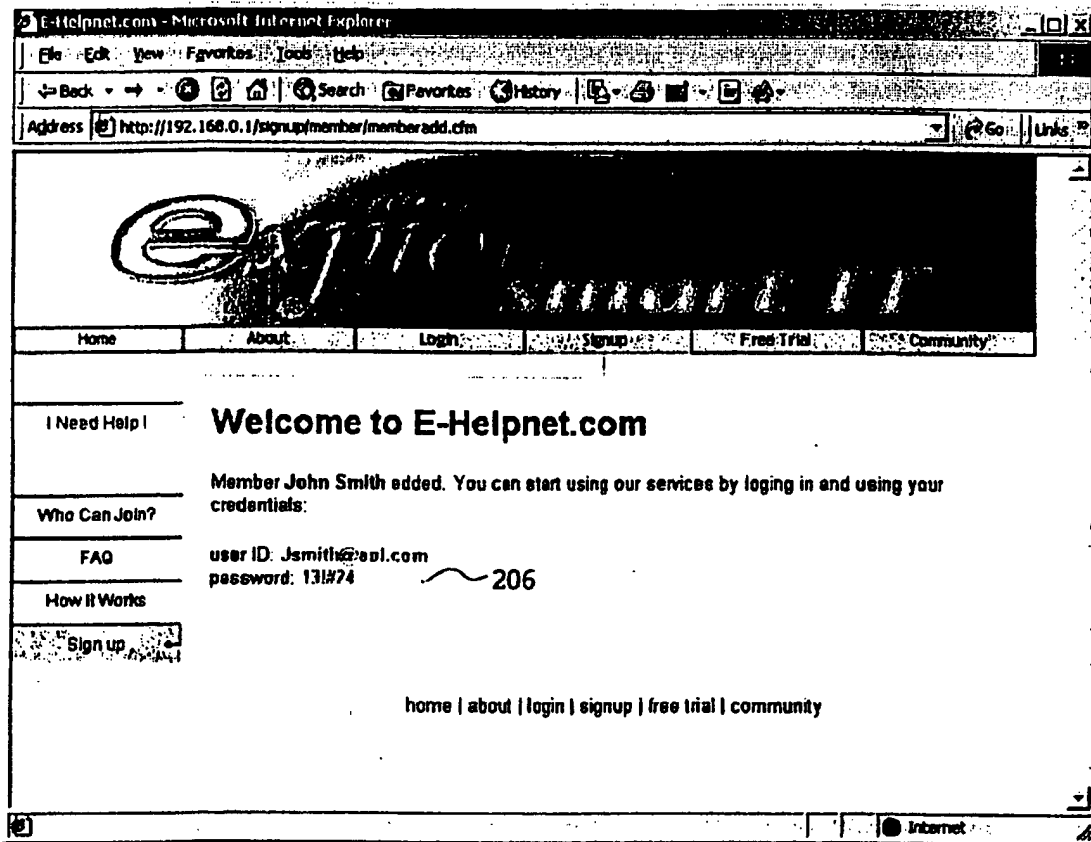


FIGURE 7

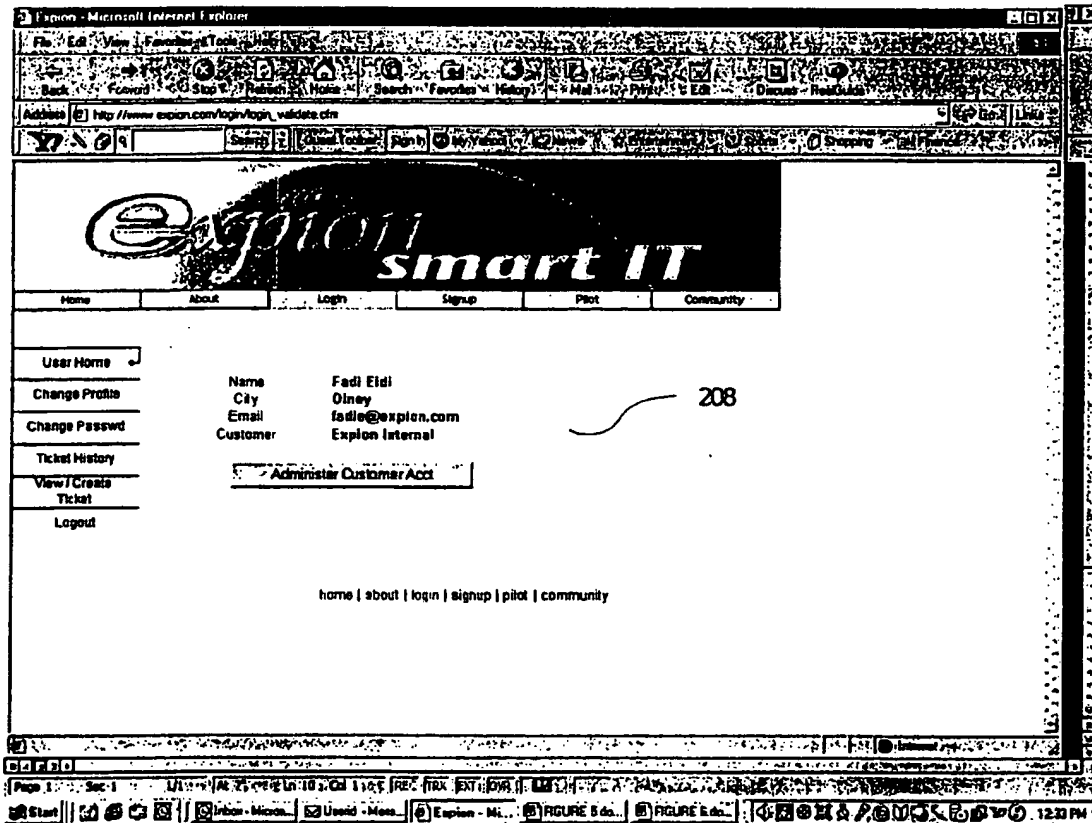


FIGURE 8

The screenshot shows a web browser window titled "Expion - Microsoft Internet Explorer". The address bar displays "http://www.expion.com/login/member\_view\_create\_ticket.cfm". The page has a navigation bar with links: Home, About, Login, Signup, Pilot, and Community. A sidebar on the left contains links: User Home, Change Profile, Change Passwd, Ticket History, View/Create Ticket, and Logout. The main content area shows a user profile for "Fadi Eldi" with email "fadi@expion.com". Below the profile is a form to create a new ticket. The form includes a "New Ticket?" dropdown menu (labeled 210), a "Category" dropdown menu (labeled 212) set to "MS Exchange", and a "Preferred Method" dropdown menu (labeled 214) set to "Email". A "Problem description" text area is also present. At the bottom of the form are "Enter Ticket" and "Reset" buttons (labeled 216). The footer of the page contains links: home | about | login | signup | pilot | community.

User Home	Name	Fadi Eldi
Change Profile	City	Oiney
Change Passwd	Email	fadi@expion.com
Ticket History		
View/Create Ticket	New ticket ?	New Ticket 210
Logout	Category	MS Exchange 212
	Preferred Method	Email 214
	Problem description	
		216

FIGURE 9

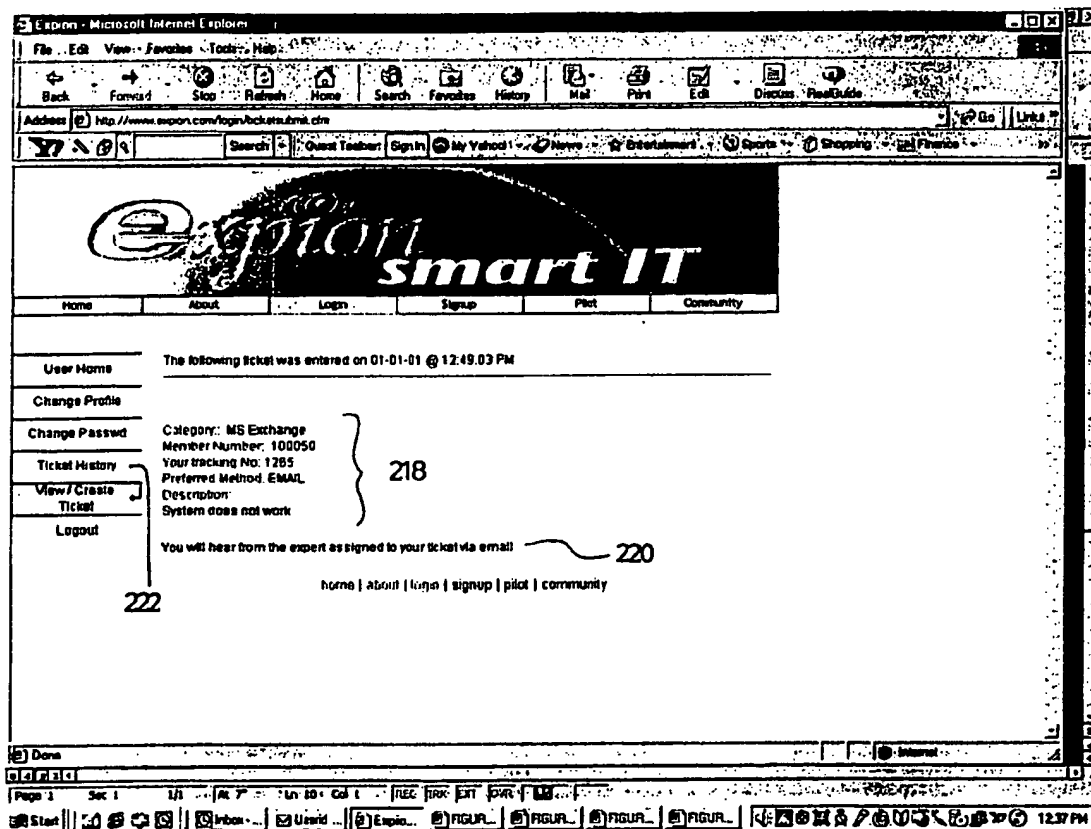


FIGURE 10

10/21

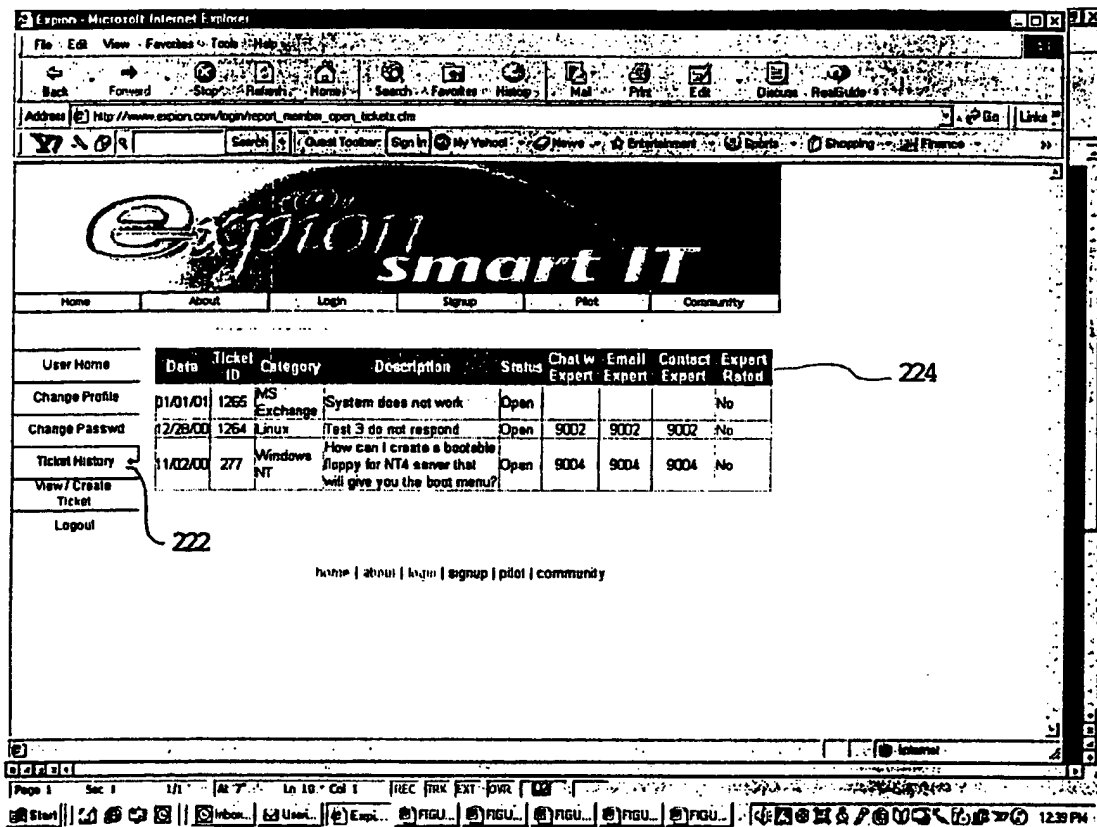


FIGURE 11

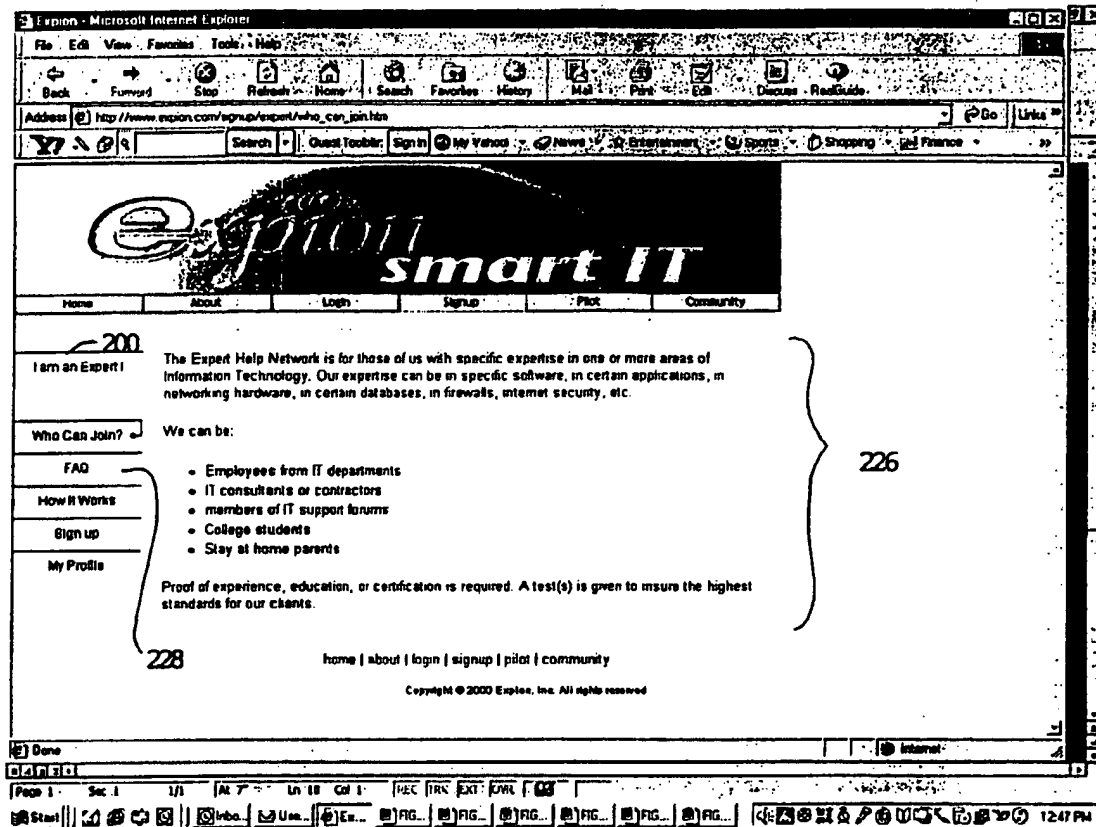


FIGURE 12



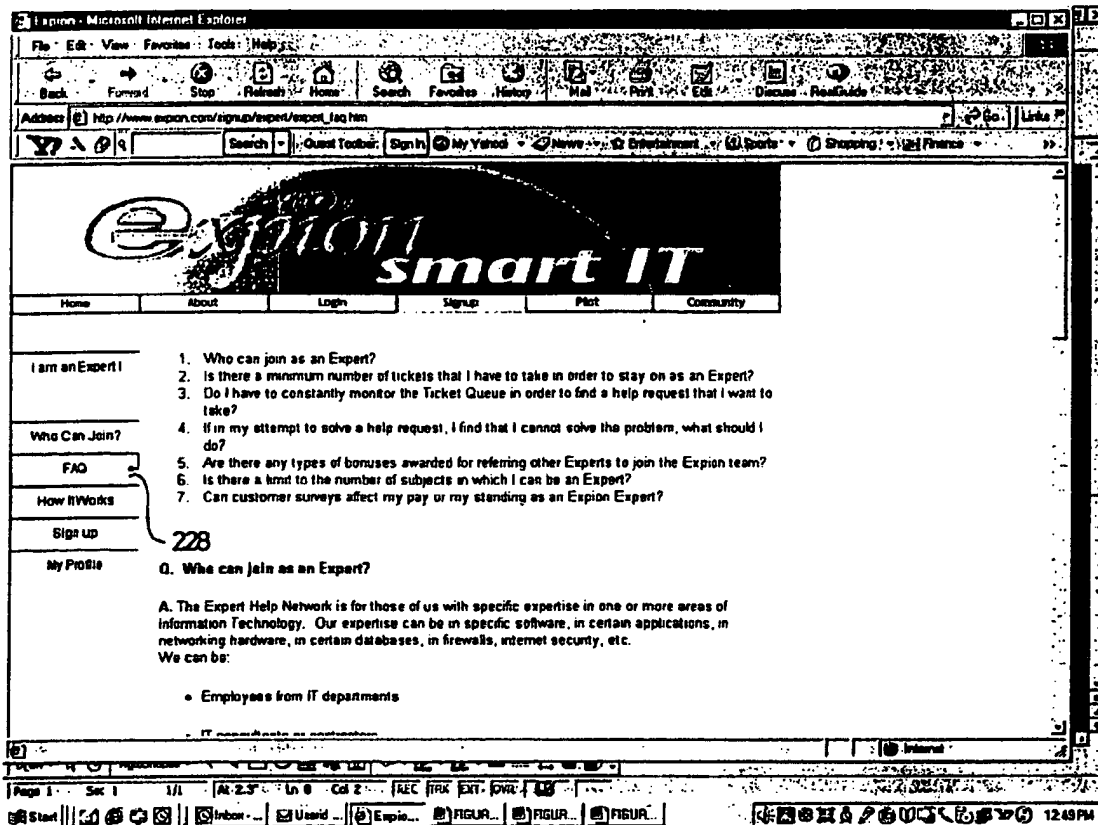


Figure 13

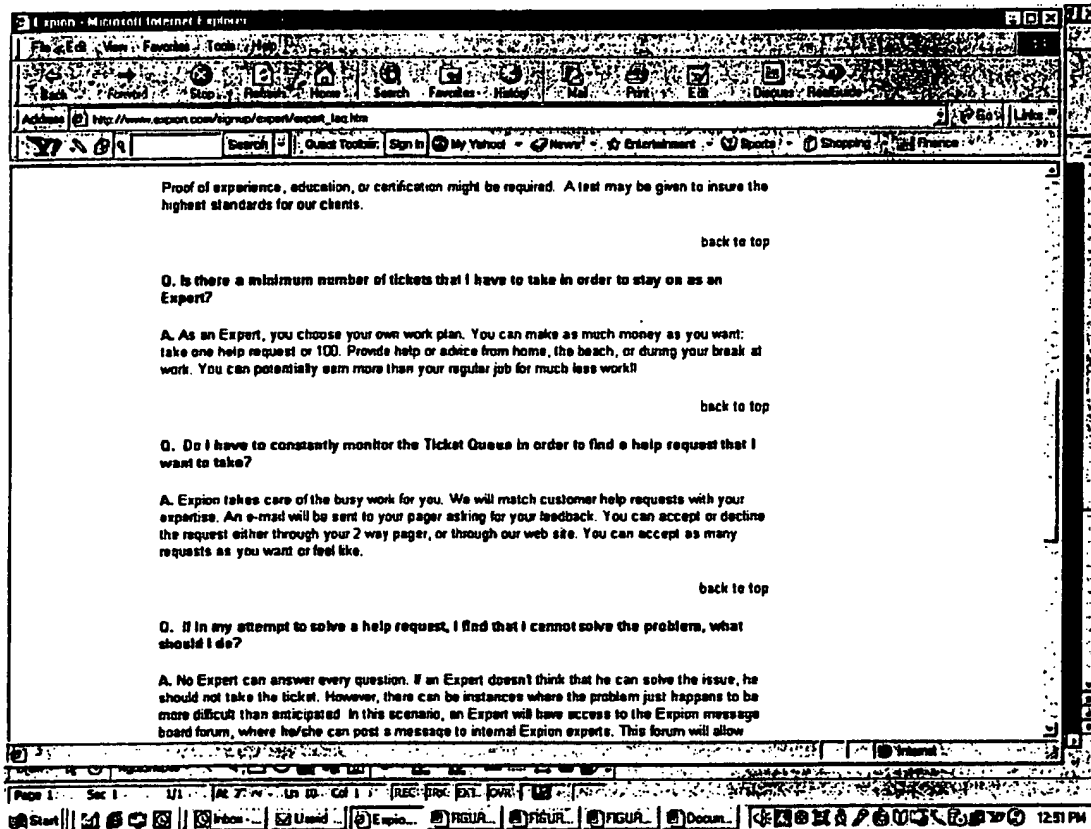
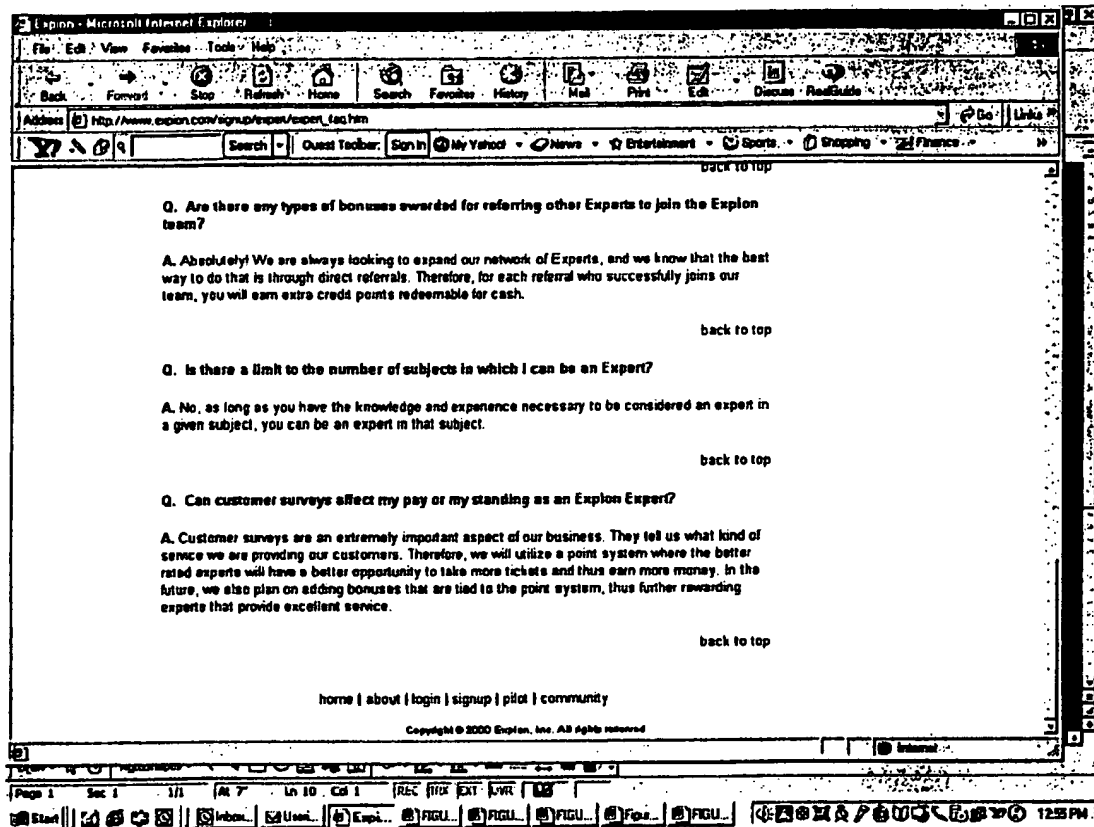


FIGURE 13A



**FIGURE 13B**

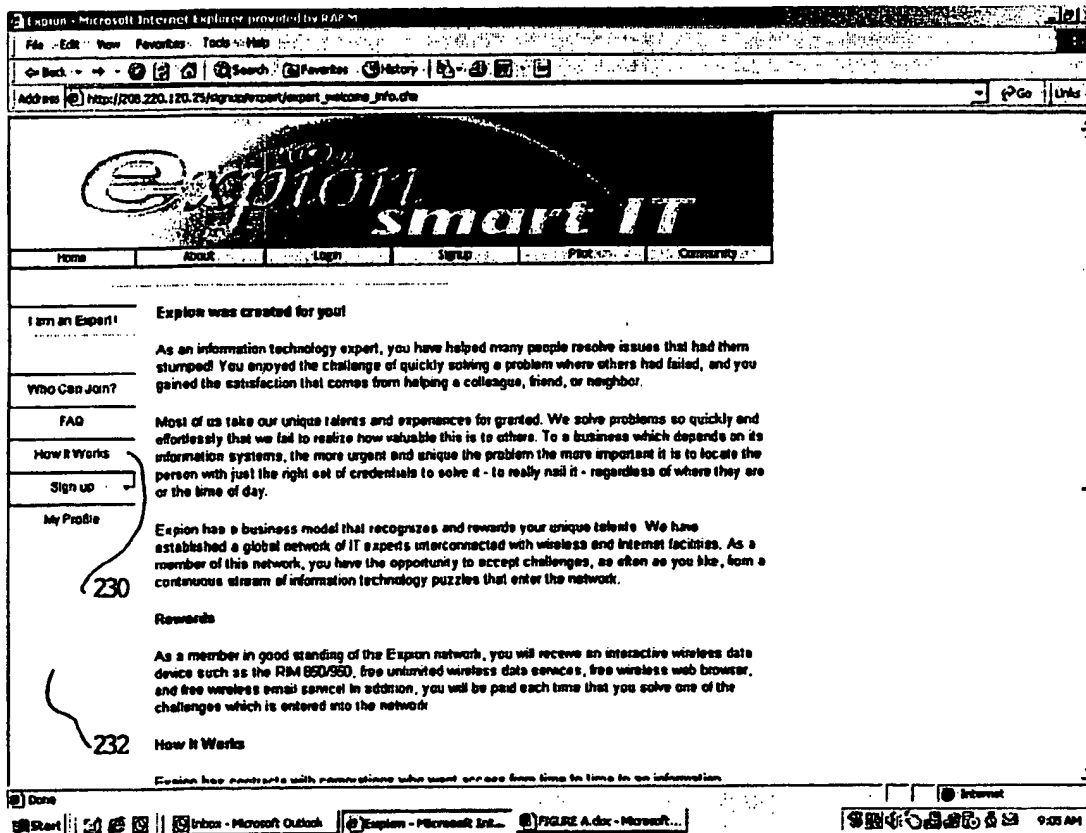


FIGURE 14

E-Helper.com - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Search Favorites History

Address http://expion-srv1/signup/expert/expert\_signup.htm Go Links

# Expion smart IT

Home About Login Signup Free Trial Community

I am an Expert!

Who Can Join?

FAQ

How It Works

Sign up

## CONTACT INFO

First Name Fadi

Last Name Eidi

Password

Confirm Password

By email Fadi@expion.com 234

By phone

By fax

By mail

City Bethesda

State/province MD

Postal code 20817

Country USA

236 Next Reset Save and Exit

home | about | login | signup | free trial | community

Done Local intranet

FIGURE 15

Microsoft Internet Explorer  
Address: http://expion-srv1/signup/expert/expert\_registration.cfm

# expion smart IT

Home About Login Signup Free Trial Community

I am an Expert!

Who Can Join?

FAQ

How It Works

Sign up...

## SKILLS

Year	Type
2	Cisco
5	Exchange
6	Windows NT

238

236

Next Reset  
Save and Exit

home | about | login | signup | free trial | community

Done Local intranet

FIGURE 16

Microsoft Internet Explorer - http://expion-srv1/signup/expert/expert\_registration.cfm

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites History

Address http://expion-srv1/signup/expert/expert\_registration.cfm Go Links

# Expion Smart IT

Home About Login Signup Free Trial Community

I am an Expert!

Who Can Join?

FAQ

How It Works

Sign up

## EXPERIENCE

Client/employer: TMS

Duration From: 01 / 1996 To: 03 / 2000

Your role/title: Is Manager

Description: Manage Support Group

URL

Next Reset Save & Exit

Another Experience

home | about | login | signup | free trial | community

Local intranet

FIGURE 17

Microsoft Internet Explorer - http://expion-srv1/signup/expert/expert\_registration.cfm

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites History

Address http://expion-srv1/signup/expert/expert\_registration.cfm Go Links

# expion smart IT

Home About Login Signup Free Trial Community

I am an Expert I

Who Can Join?

FAQ

How it Works

Sign up

REFERENCE

First name: Stewart

Last name: Smith

Title:

Company:

Email:

Phone:

Description:

242

Next Reset Save and Exit

Another Ref

home | about | login | signup | free trial | community

Local Intranet

FIGURE 18



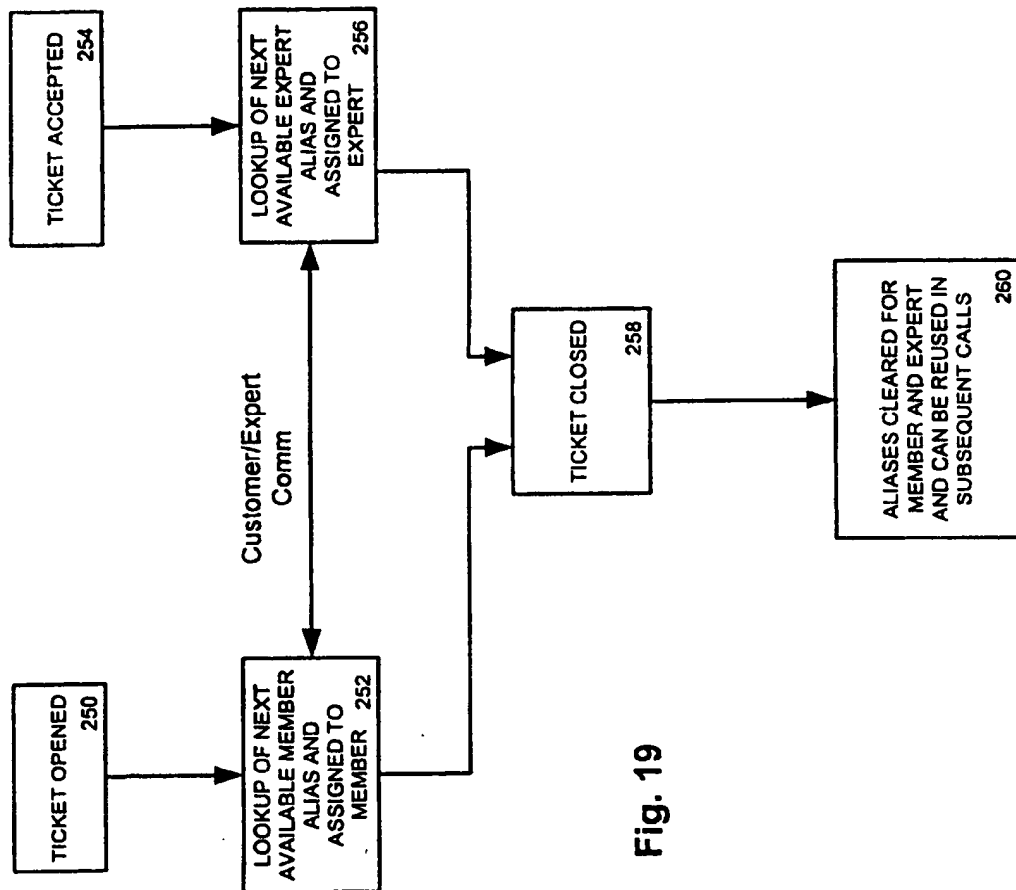


Fig. 19